Personnel Action Entry Procedures

TRANSFERRING AN ACTIVE EMPLOYEE TO CLASSIFIED SERVICE WHEN THE POSITION WAS POSTED WITH A JOB REQUISITION IN eRecruit

This document is intended to provide users of the HCM 8.8 database with instructions on how to transfer an active employee into Classified service. Screen shots are provided to aid in ease of navigation through the process. In order to use this functionality, you must have access to the State of Vermont HCM web site, a valid user ID and a valid password. Users must first log into the PeopleSoft web site http://hcm.per.state.vt.us/psp/HRPRD/?cmd=login and then follow the detailed instructions below.

Friday after payday is first day to enter records for next pay period (pay period begin Sunday).

Unless otherwise notified, deadline for HCM record entry is Tuesday of a pay week at 4:25 p.m.

DO NOT transfer an active employee with a retroactive effective date (dates that occurred before the pay period you are entering records for) until the Monday of pay week. This request is based on the fact these records will cause issues with the post production transfer of data from North American Payroll to Finance.

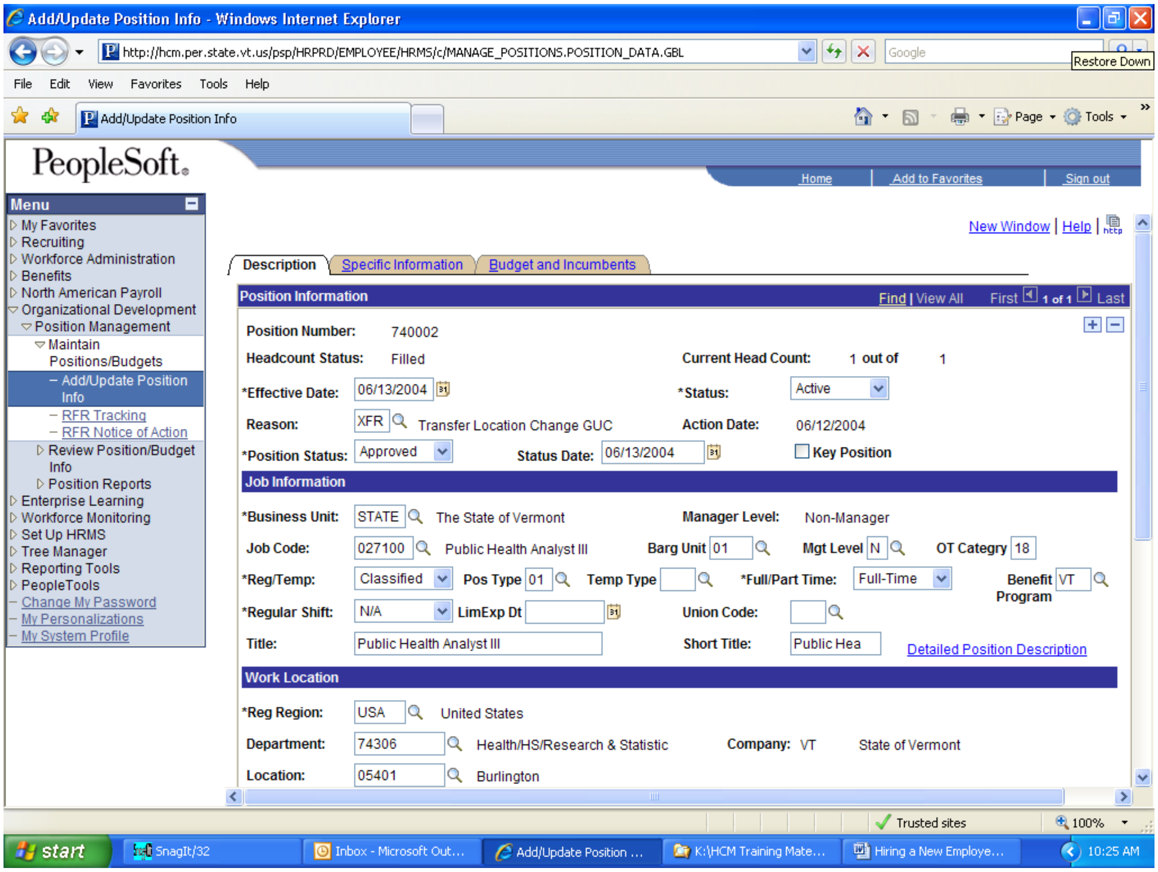
- ✓ **Check the position for accuracy.**

Navigate to **Organizational Development> Position Management> Maintain Positions/Budgets> Add/Update Position Info.** Type in position number and search.

Things to verify in Position Management prior to processing the new hire transaction:

- ✓ Is the schedule set up correctly in the position? Check the full or part-time status along with standard hours (**located on the Description page**) and FTE (**located on the Specific Information page)**. See screen shots on following page.

- ✓ Ensure the three fields indicating full or part-time status accurately reflect the schedule this employee will work – **for example:** an employee working 20 hours per week would have an FTE of .50, standard hours of 20 and the status would be part-time. However, in a job share situation the position would appear as full-time and each employee would appear as part-time in their specific Job Data records.

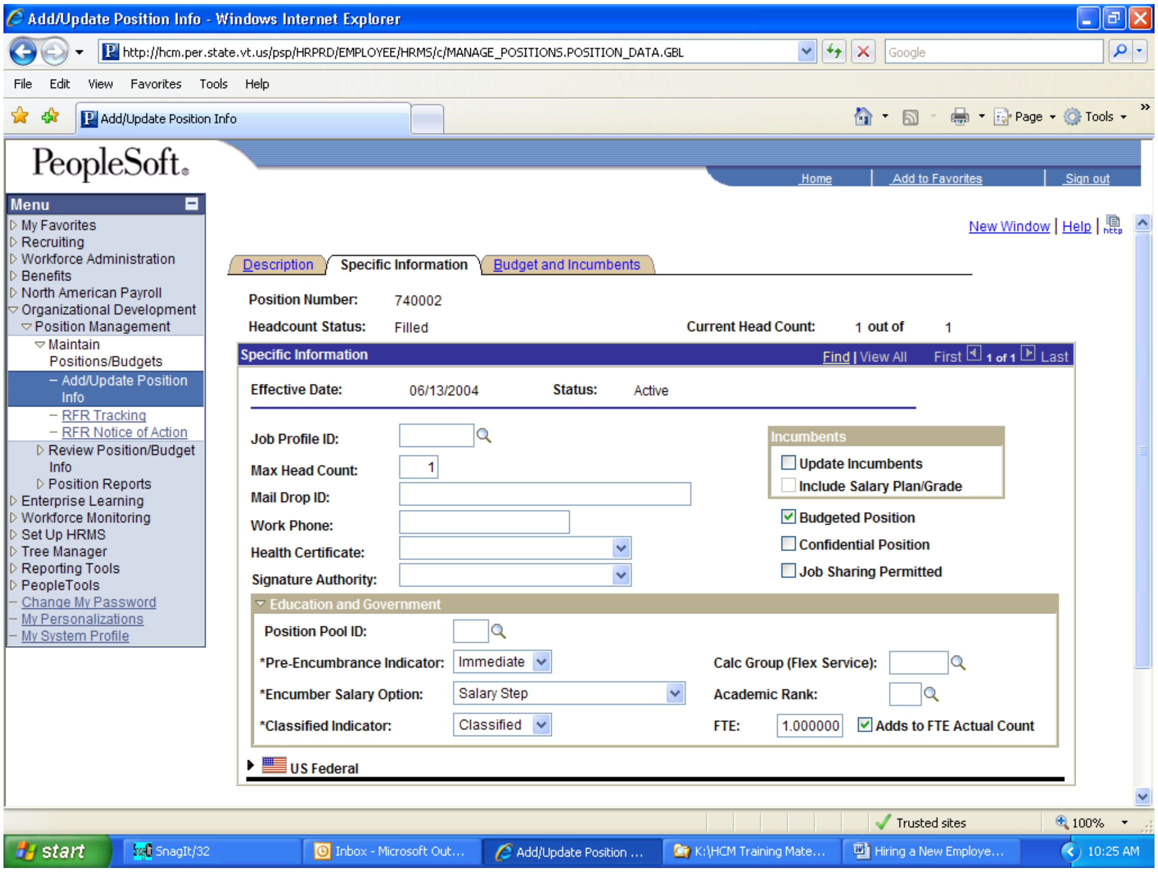


On the Description page

- ✓ Is the overtime category correct for the pay grade?
- ✓ Is the Reg/Temp field set to the correct position type? Exempt, Classified, Temporary, etc?
- ✓ Is the GUC (department field) correct?
- ✓ Is the Location (zip code) correct?

If changes are required, see additional documentation regarding position updates to Governmental Unit Codes, standard hours etc.

If a correction or deletion of a record is required please contact HRIS.

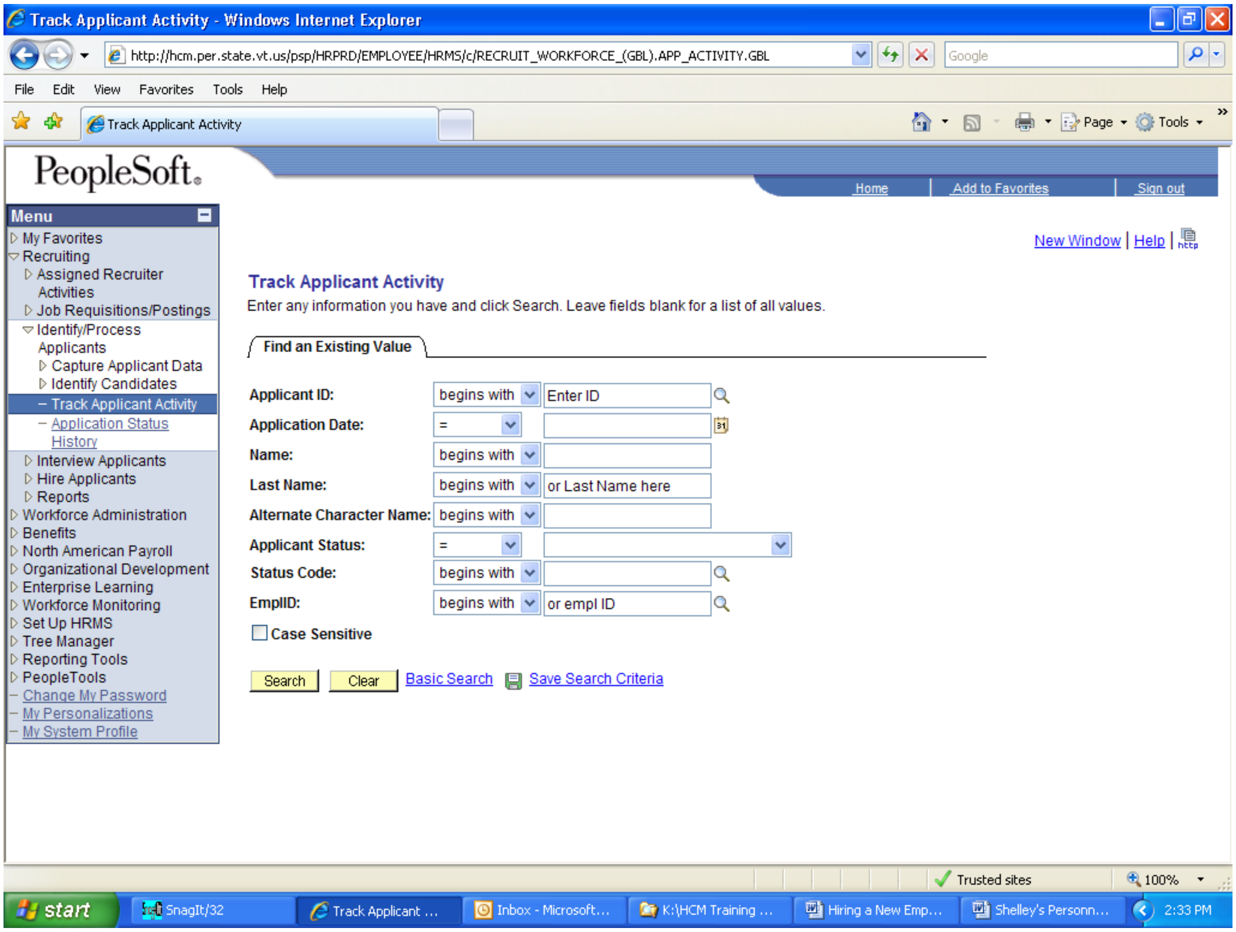


- ✓ Also ensure the Adds to FTE Actual Count box is checked on the Specific Information request. The FTE box is checked whether the position is full or part-time.

After reviewing the position for accuracy, navigate to **Recruiting > Identify/Process Applicants > Track Applicant Activity** and search for the applicant using Applicant ID or Name.

Once you select the applicant, you may receive a list of Application Dates associated with this individual. The job requisition is located under the date the applicant actually applied to the job requisition.

Navigate by clicking on the Application Date until you find the appropriate job requisition before you proceed.



There are times when the applicant applied for more than one job on the same day. It will become apparent when you are in an Application Date for a particular employee. The Job Requisition bar will include 1 of 2 (or more).

If the applicant has applied to multiple jobs on one effective date you can 'view all' to see each requisition applied to for that particular date. You do so by clicking the 'view all' link which will be available on the Job Requisitions bar.

Using 'view all' will allow you to see multiple job requisitions for the same application date.

Once you have identified the appropriate job requisition for the applicant, click the arrow in the **Disposition** box and select the choice of **080-Ready to Hire** (do not change the status date). Tab out and click **Save.** See the following page for screen shot.

Setting the applicant 080 – Ready to Hire will bring Position Management data forward into Workforce Administration once the Transfer/INT record is saved.

- To recap – you have reviewed Position Management and set the applicant 080-Ready to Hire. Verifying the accuracy of data will reduce the number of errors with this transaction.

TRANSFER TO CLASSIFIED SERVICE

Navigate to **Workforce Administration >Job Information >Job Data** and search for the applicant using Applicant ID or Name.

This will take you to the **Work Location Page**. Once there, add a new record by clicking the plus (+) sign on the right side of the page.

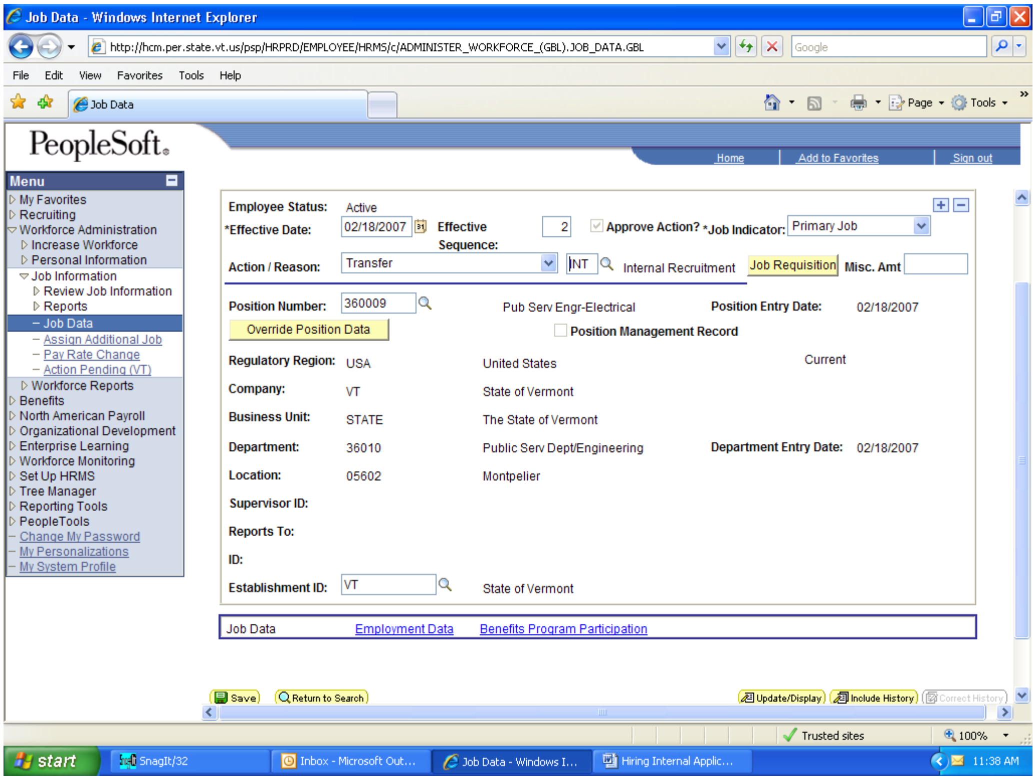
Enter the effective date of the transfer to Classified service (MUST be the first day of a pay period – Sunday) **DO NOT transfer an active employee with a retroactive effective date** (dates that occurred before the pay period you are entering records for) until the Monday of pay week. This request is based on the fact these records will cause issues with the post production transfer of data from North American Payroll to Finance.

Tab to Action and choose Transfer

Tab to Reason and choose INT – Internal Recruitment

The system will display the **Job Req** button to the right of the action and reason code fields. Click the yellow Job Req button. If the applicant record was properly set to **080 Ready to hire** on the job requisition, the Search Results will list the correct job requisition. Select the correct job requisition.

Once inside the job req button you will choose the Job Req. When you return to the **Work Location** page you will note that position information has already populated. Again, this data came forward from the data located in **Position Management**. This is why it is vital to review Position Management prior to processing the Transfer transaction through eRecruit.



Before saving, verify data on the Job Information page is as you expect it.

Verify that Job Indicator is set to “Primary” (for additional information concerning Primary/Secondary jobs, see Assign Additional Job)

Verify Position Number, Department (GUC) and Location (zip code)

On the Job Fields (VT) page

- Delete any comments from the previous record

Now **save** the Transfer/INT record.

You have now completed the process of either closing the job requisition or reducing the target openings on your job requisition in eRecruit. In addition, if this was a job requisition with only one target opening, saving this record changed the status of all other applicants on the Job Requisition to **110-NoHire** (not hired). Providing there was only one job opening, the requisition will no longer show on your list of existing job requisitions under Maintain Requisition Activity.

NEXT

You are still in the navigation **Workforce Administration >Job Information >Job Data**

On the Work Location page
Add a second record by clicking the plus (+) sign on the right side of the Work Location page.

- Enter Effective Date (1st day of current pay period). Same date as the Transfer/INT record

- Tab to Effective Sequence and enter 1

Tab to action and choose Transfer

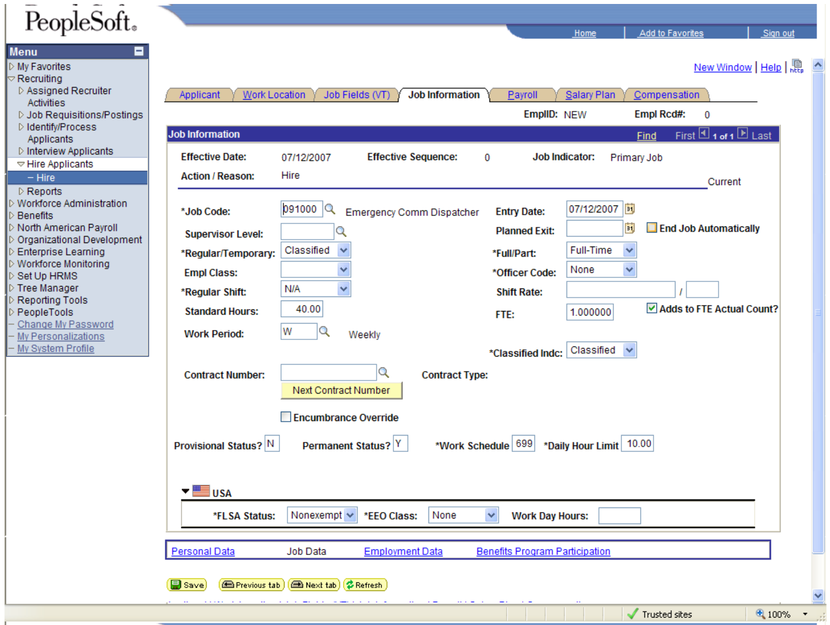
Tab to Reason and choose CLS – To Classified Service

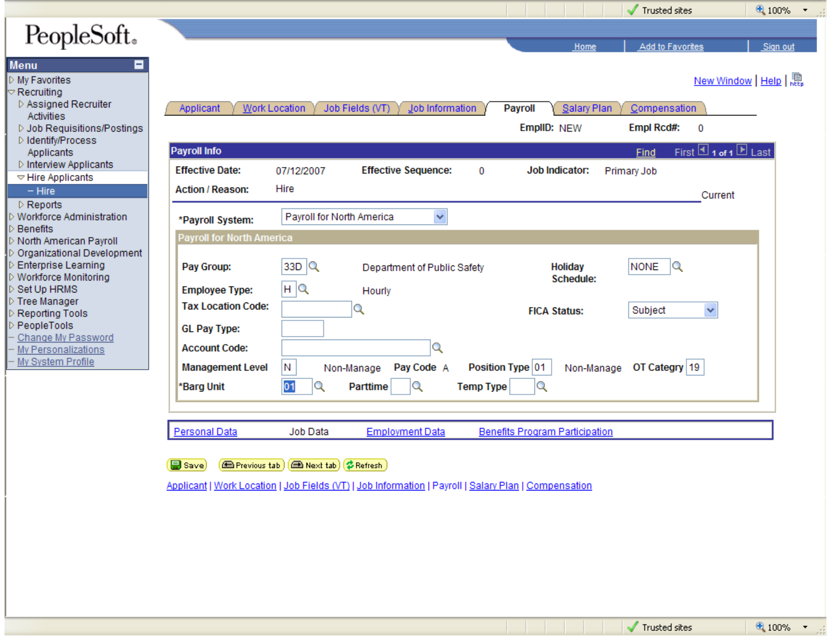
Example of Overriding Position Data

There are times when an employee's record does not match Position Management. Job share situations are an example. Another example would be when an employee is working an approved alternate work schedule.

If there is a need to override data located in Position Management – you will use the yellow Override Position Data button located on the Work Location page just below the position number to open the fields associated with the position. This override is used to manually change data specific to the employee only. **Please note**, you must leave the employee's job data in override or position data will come forward from Position Management defaulting all data back to what appears there (**including the hiring step associated with this particular job code as well as the hourly rate**).

In the case of an approved alternate work schedule you would change the Work Schedule on the Job Information page and the Overtime Category on the Payroll page. You would also include a comment regarding the alternate schedule on the Job Fields(VT) page.





In the example of an overtime category change based on an employee working more than 8 hours in a day. This type of change is made only in the employee's job data. To receive approval you would submit a request and receive an approved category from the Labor Relations division of the Department of Human Resources before changing this data.

On the Job Fields (VT) page

The system will not automatically place a transferred employee in a six-month original probation. Therefore, you will enter a third record but not yet.

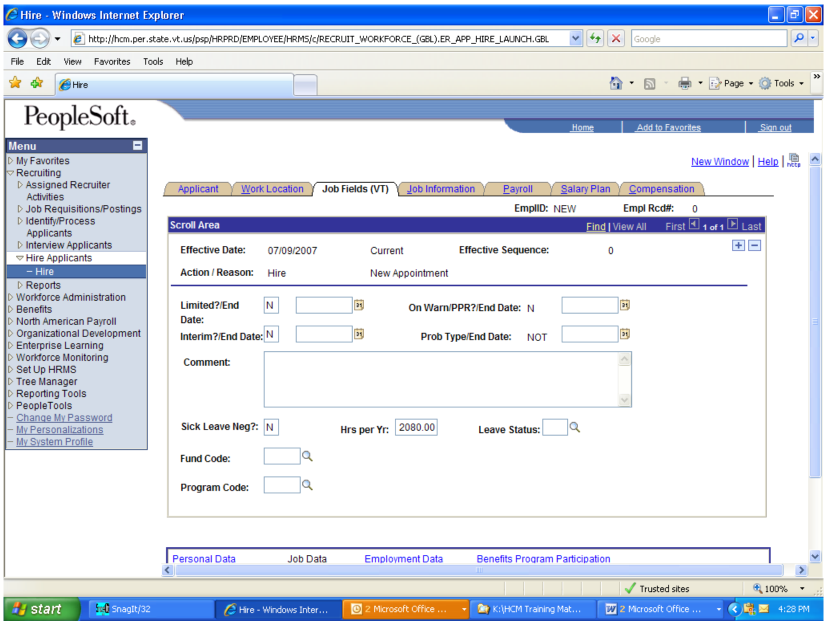
Depending on the specific circumstances of this new hire, you may want to enter a Limited or Interim Y with an end date if appropriate.

Enter comments (if any) – for instance, alternate schedules, hire-into-range with a DHR approval date, job-share, etc.

Enter Fund & Program codes (if used)

This page also includes a field titled 'Hrs per Yr:'.

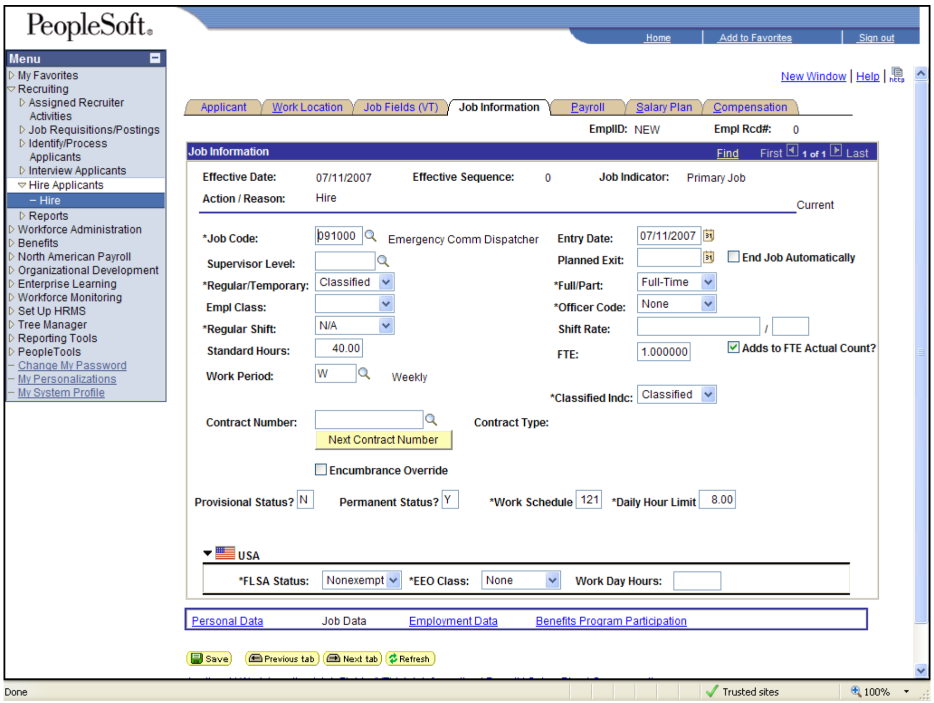
There are approximately 38 position titles that include hours per year greater than 2080. Those positions are mainly located with ANR, Military, DPS and Woodside. In most cases, this number will be 2080. If in doubt, contact the Labor Relations or HRIS division of the Department of Human Resources for additional information. Only change the data if the hours worked are greater than 2080.



On the Job Information page (screen shot on following page)

Again, notice that most of the fields on this page are already populated – this data came forward from Position Management.

However, in the examples given previously – the Job Information page would require changes if an employee is part-time but the position is full-time (the job-share situation). In the example of a job share, you would change the Full-time to Part-time and adjust the Standard Hours and FTE to match the employee's schedule. You would use the Override Position Data button on the Work Location page to make these fields of data available for override. **Please note**, you must leave the employee's job data in override or position data will come forward from Position Management defaulting all data back to what appears there (**including the hiring step associated with this particular job code as well as the hourly rate**).



- Verify Job Code
- Verify the Regular/Temporary field reads correctly
- Verify Full/Part, Standard Hours and FTE are accurate
- Check Permanent Status (Y for Classified, N for temp, contractual)
- Check Work Schedule (121, 699 or 300)

- Verify Daily Hour Limit and Work Schedule

- Do nothing with the FLSA Status, EEO Class or Work Day Hours.

On the Payroll page (screen shot on following page)

- Verify Pay Group

- Enter Tax Location Code (usually the same as Location from the Work Location page)

- **FICA Status is almost always Subject – do not change this field** to Exempt or Medicaid Only unless you have communicated with the Payroll division.

- **Management Level, Bargaining Unit, and Position Type** are fields that populate from Position Management and should not be changed by anyone other than a staff member from the Classification division of the Department of Human Resources. **Do not override this data.**

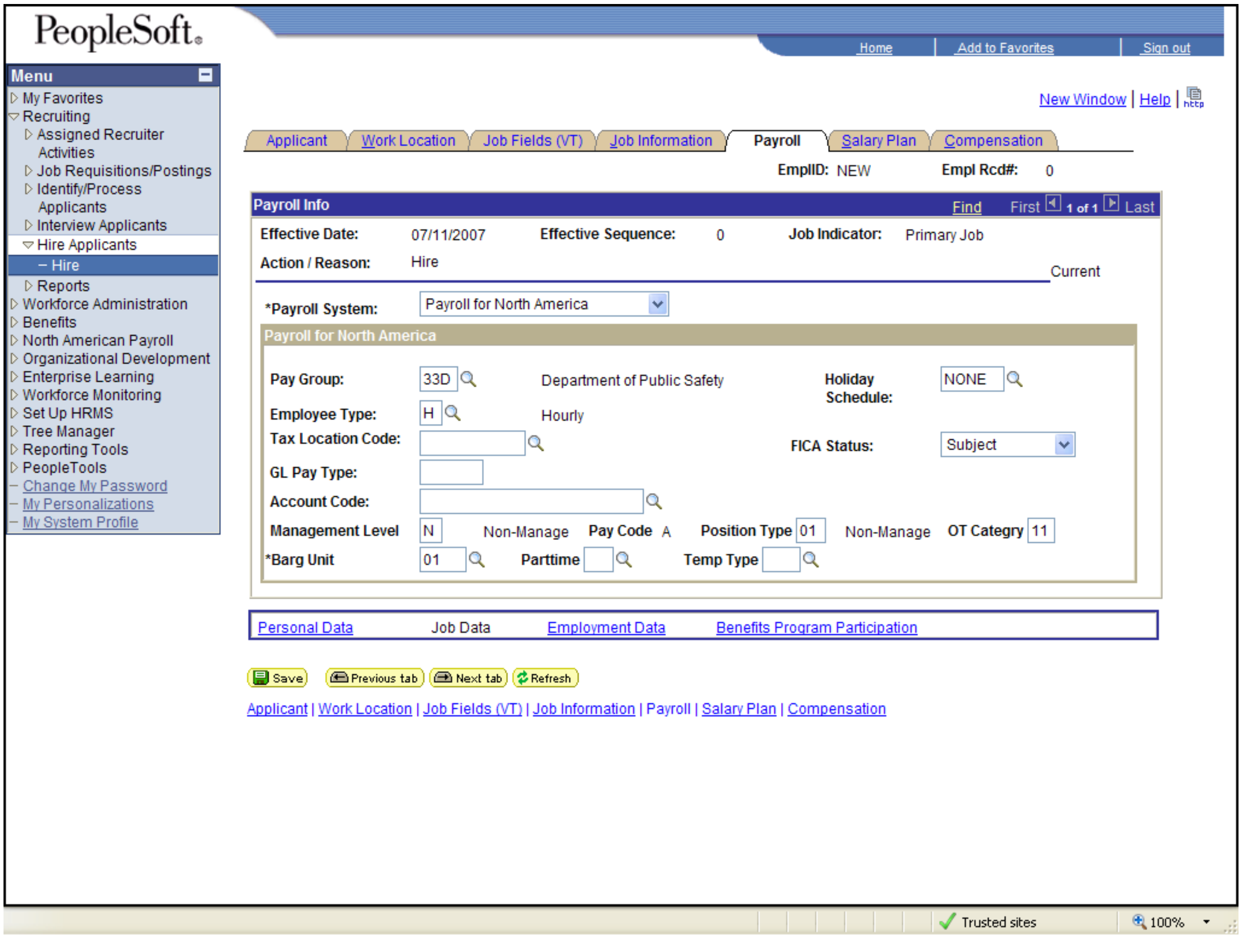
- **OT category** comes forward from Position Management

May require changing if this employee is in an approved alternate schedule **OR** is in a pay grade 23 or higher and is being allowed a cash/comp option for overtime compensation (in those cases the OT category would be 37 for pay grade 23 and category 38 for 24 or higher).

- If this employee is not working a full week or a full year you will want to choose the appropriate status from the dropdown menu on the Parttime field.

FP	Full Time / Part Year
PF	Part Time / Full Year
PP	Part Time / Part Year

- Temp Type also comes forward from Position Management.
- Delete temp type if necessary



On the Salary Plan page

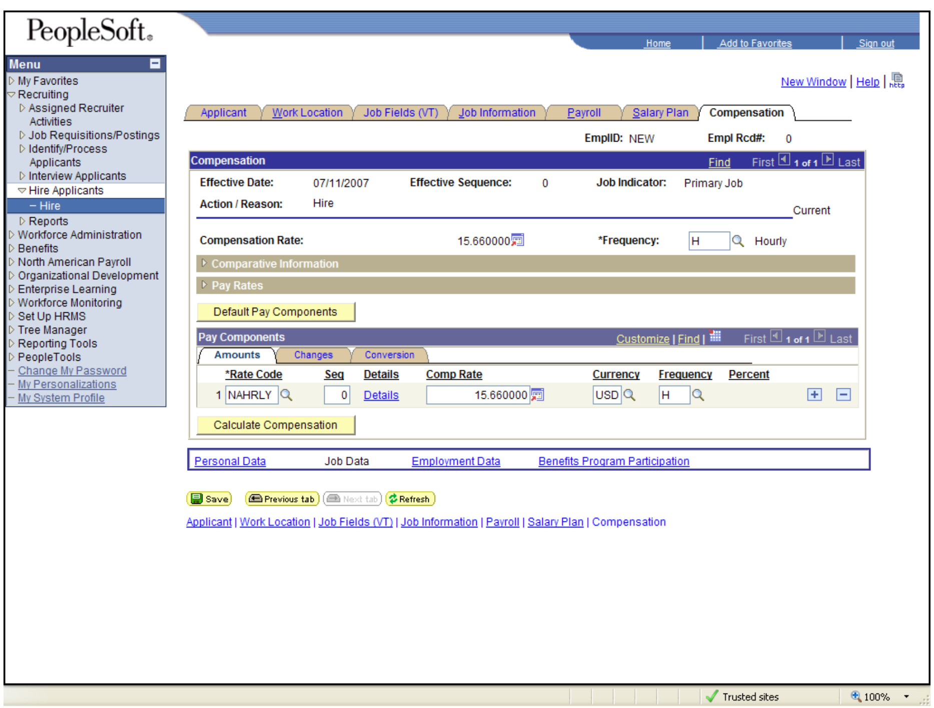
- Verify Paygrade
- Enter step if this is a hire into range (and include a comment on the Job Fields (VT) page 'HIR; with the DHR approval date')
- Enter Next Step Date (effective date plus time for step).

The required time on each step in the Step Pay Plan shall be as follows:
Step 1 (probation) - normally, 6 months
Step 2 (EOP) - one year Step 9 - two years
Step 3 - one year Step 10 - two years
Step 4 - one year Step 11 - two years
Step 5 - one year Step 12 - two years
Step 6 - two years Step 13 - three years
Step 7 - two years Step 14 - three years
Step 8 - two years Step 15 - final step

On the Compensation page

- Verify hourly rate in Comp Rate field at the bottom of the page matches the pay grade and step you've entered on the previous page.

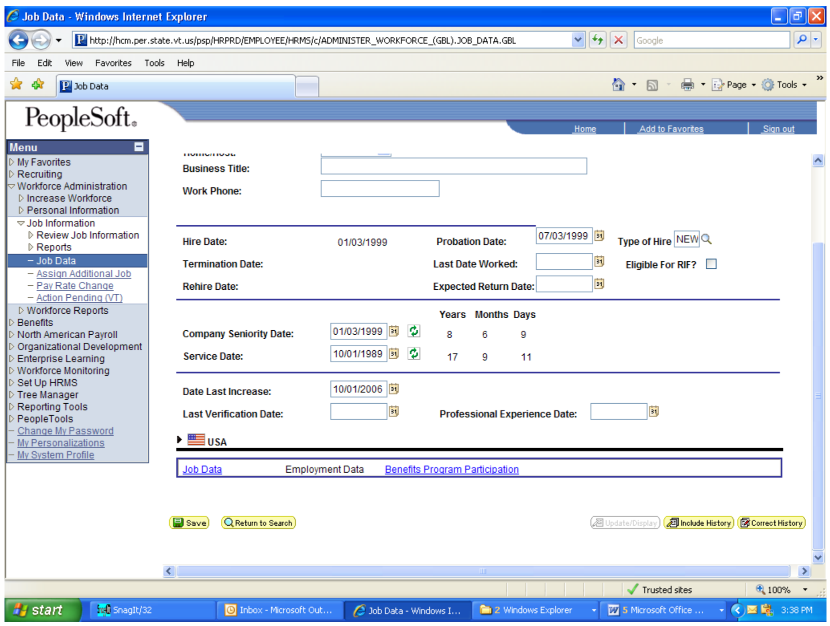
Click the yellow Calculate Compensation button and verify the rate at the top of the page matches the rate at the bottom.



DO NOT SAVE YET

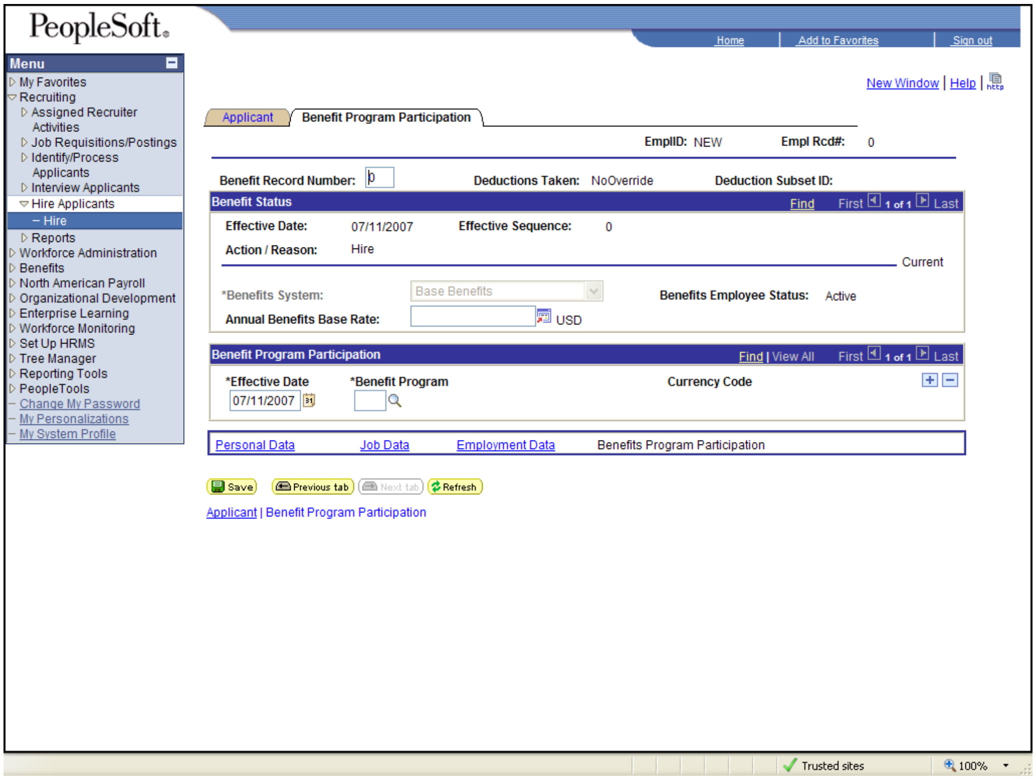
At the bottom of the page, click the Employment Data link to display the next section.

Change the Service Date **ONLY** to the date of transfer. This date defines when an employee will have annual leave balances available for use. If you do not update this date the employee will have available balances prior to being eligible to receive the leave.



DO NOT SAVE YET

At the bottom of the page, click the Benefits Program Participation link to display the next section.



On the Benefits Program Participation page

- Add a row by clicking the plus (+) sign on the right side of the page under the Benefit Program Participation bar.
- Change effective date to date of transfer (first day of the pay period)
- Enter Benefit Program

VT for positions eligible to receive benefits (Position Type 01, 02, 04, 05, 80, 81, 82, 83, 84, 85, 87, 86)

VTE for those positions not eligible to receive benefits (Position Type 65, 66, 70, 88, 89)

Tab back through all pages in the three links you have worked in to verify the data.

SAVE

⁕⁕ YOU MUST PROCESS A THIRD ACTION TO PLACE EMPLOYEE ON ORIGINAL PROBATION⁎⁎

Personnel Action Entry Procedures

PLACE EMPLOYEE ON ORIGINAL PROBATION

Employees transferring into classified service for the first time must serve an original probationary period. An action must be processed in HCM for transfers into classified service to be placed on original probation.

Add a third record by clicking the plus (+) sign on the right side of the Work Location page.

Enter Effective Date (1st day of current pay period). Same date as previous records.

Tab to Effective Sequence and enter 2

Tab to Action and choose Probation" from drop down list

Tab to Reason and choose "PRB"

On the Job Fields page

Delete any previous comments

In Prob Type/End Date field, enter the end date of the original probationary period (effective transfer date + duration of probationary period – in most cases, six months).

SAVE

This information is intended to provide general information, and to demystify some of the technical procedures. Again, this is an overview. Individual situation will vary. It is important to read bargaining unit and policy language and/or to contact the Department of Human Resources with questions concerning the specifics of your situation.

Personnel Action Entry Procedures

Unless otherwise notified, deadline for HCM record entry is Tuesday of a pay week at 4:25 p.m.

NO data entry of records by field staff after deadline without prior approval from HRIS.

Friday after payday is first day to enter records for next pay period (Sunday).